Content Management System Webmaster's Guide

Learning to use the City of Alexandria's
Content Management System (CMS)

Revised June 25, 2012

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1 OVERVIEW

This document is designed to provide an overview of how to use the City of Alexandria's Content Management System to add, edit and delete content on the City's Web site. The intended audience for this document is Alexandria authors who have the responsibility for managing content on the overall public Web site. However, this Webmaster's Guide is not intended to be an exhaustive description of all functionality contained within the Web site, rather, it is intended as a quick start guide.

1.1 What Authors Need in Order to Publish Content

Authors will need access to the following items in order to access the Content Management System (CMS) and add, edit or delete content on the Alexandria Web site:

1. A high speed Internet connection
2. A PC with Windows XP, Vista or 7
3. Internet Explorer versions 7, 8 or 9
4. A user name and password (provided by the E-Government Team)

NOTE: The CMS is not compatible with a Mac Operating System.

2 USING THE CMS

2.1 Logging In

1. Go to alexandriava.gov/cms
2. Click **login.**
3. Enter your **user name** and **password** in the pop up box.
4. Click the **Login** button.
5. Click the **Workarea** icon.

NOTE: If you are unable to login, make sure your Web browser is able to accept cookies.

2.2 Understanding the Workarea

The CMS Workarea is a Web-based interface for accessing different areas of the content management system.

The bottom left side of the Workarea provides links to different components of functionality. As you click on the links, the pages will appear on the right side of the browser window:

- **Content** – Every content item resides in this folder or one of its subfolders.
- **My Workspace** – Functionality is disabled.
- **Library** – Stores images, files and quicklinks that can be inserted into editor content.
- **Modules** – Allows you to access special modules of functionality, such as Collections.
- **Settings** – Allows you to change your username, password or email address, as well as view which group(s) to which you belong.

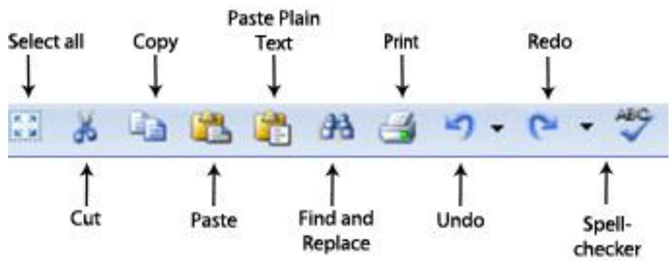
2.3 Understanding the Javascript Editor

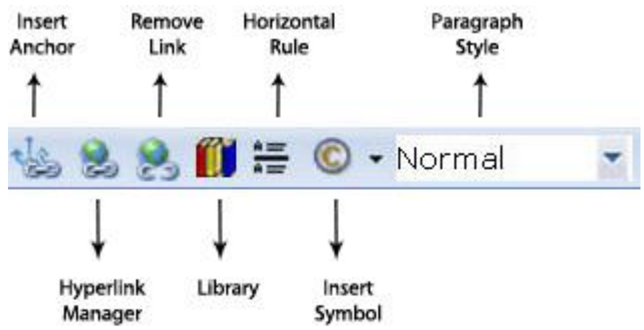
Whenever you add, edit or delete content on the CMS, you will use its built-in Javascript Editor. The Javascript Editor's tools work exactly like those you would find in a word processing program. Using the Javascript Editor, you can:

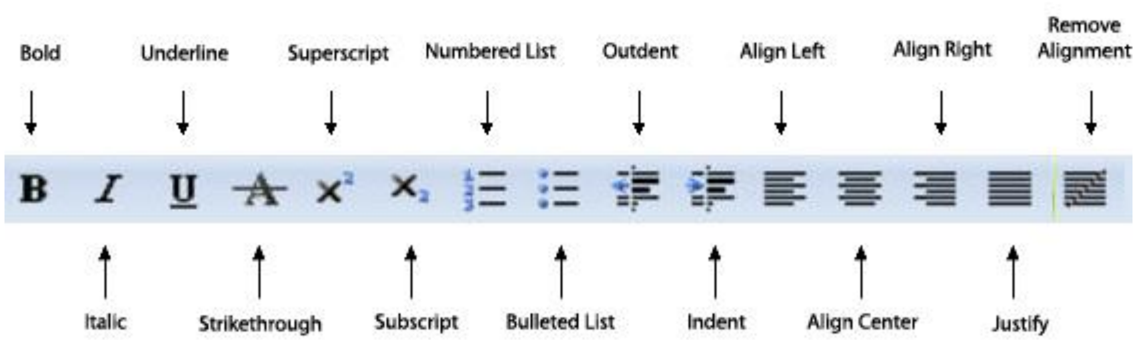
- Add, edit and delete text
- Format text with predefined styles or with simple attributes
- Align paragraph text
- Add numbered or bulleted lists
- Add bookmarks
- Add images
- Add hyperlinks
- Spell check

2.3.1 Defining the Javascript Editor's Toolbar Icons

The following diagrams help to explain each function of the toolbars' icons:







2.4 Add Content

1. Under the Content tab, navigate to your Department folder and click the **info** subfolder, or other folder in which to add content.
2. Click **New** > **HTML Content**.
3. When the Edit Content window appears, you are ready to create the content.
4. Enter a **Title** for your content. It is best practice to keep it as short and descriptive as possible. ***See Section 3.6 (page 19) for additional information.***
5. Enter your content in the content block. All titles and text should be left aligned, never centered. **If you are copying and pasting from another document (Word, Outlook, etc.), and to prevent potential formatting errors, right-click in the body area and select "Paste Plain Text" or select the Paste Plain Text icon from the toolbar.** You can also use predefined heading styles and paragraph styles. Heading 1 should always be used for page titles, and Heading 2 should be used for all sub titles or sub headers. Make any additional modifications you wish.
6. You **must** enter a brief summary in the **Summary** tab. A summary provides a short description of content to supplement the title when displaying a list of content on a Web page. The summary is also used for Facebook posts, RSS feeds, and it may be displayed by Web search engines (such as Google).

NOTE: The CMS automatically generates a summary for new content if none exists. If the summary is blank, the CMS copies the first 40 words of the content to the summary. After the content is published, you can update or edit the summary.

7. You **must** enter metadata in the **Metadata** tab. Metadata helps site visitors find content on your Web site.
    a. Enter useful **Keywords** that may be relevant to the content and will be searched by leading search programs. You may select a pre-existing keyword by selecting the keyword, or add your own, by selecting the **Add** button. If you would like to select multiple keywords to add, click on a keyword and hold down the CTRL key to select more keywords, and click **Add**. If you need to remove any keywords, you can select one or multiple keywords, and click the **Remove** button.
    b. It is not necessary to enter information in the **Alexandria Searchable Text** field. A period is automatically inserted for you – this simply puts a period at the end of the search results.
    c. **Redirect URL** will allow you to go to a URL (Universal Resource Locator) from a navigation pane that is not within the CMS. See **alexandriava.gov/CityCode** as an example.
    d. The **CommentBoardID** field is used to attach an online comment board to a CMS content block. This can be left blank by default. If there is an existing comment board you want to link to, contact the Web Team for the ID# to insert here. ***See Section 3.7 (page 21) for additional information***.
    e. Use the **Image Data** field to add an image to your content. This image will be used for Facebook posts. If no image is assigned to your content, the CMS will use the City seal as its default image for Facebook Posts.

8. In the **Schedule** tab, enter the start and end date for when the content should appear on the Web site (optional).
    a. **Archive and remove from site (expire) –** DOES NOT allow visitors to view content upon expiration and is not indexable by search engines. However, it does allow the Webmaster to view and edit the archived content by going to View > Archive Content.
    b. **Archive and remain on site –** Content is removed for Workarea, allows content to be indexed by search engines, content is visible and it allows the content to appear in a list summary, such as News Releases and Press Releases.
    c. **Add to the CMS Refresh Report** – Disregard this option.
9. Enter any comments in the **Comments** tab (optional), which are not viewable by the public and is only shared among authorized Webmasters for that content..
10. Once you have finished adding content, the final step is to **Check In, Save, Publish** or **Cancel** your content.
    a. **Check In** – Save and check-in the content. This action updates the content in the database and exits the editor. It does not submit the content into the approval chain. Rather, it allows you and other users to continue changing it.
    b. **Save** – Save the content without leaving the editor. It is a good idea to save your work frequently, however, you **must** **check in or publish** your content. Otherwise, if you just save it and exit your content, the CMS will **NOT** save your updates.
    c. **Publish –** Publish the content to the Web site. **Note: Only the approver in the approval chain, or workflow, sees this icon. If no approval chain is assigned to the content's folder, every authorized user sees this icon.**
    d. **Cancel** – Close the editor without saving changes.
11. The **Templates** tab shows which template is being used for the content and does not require any action.

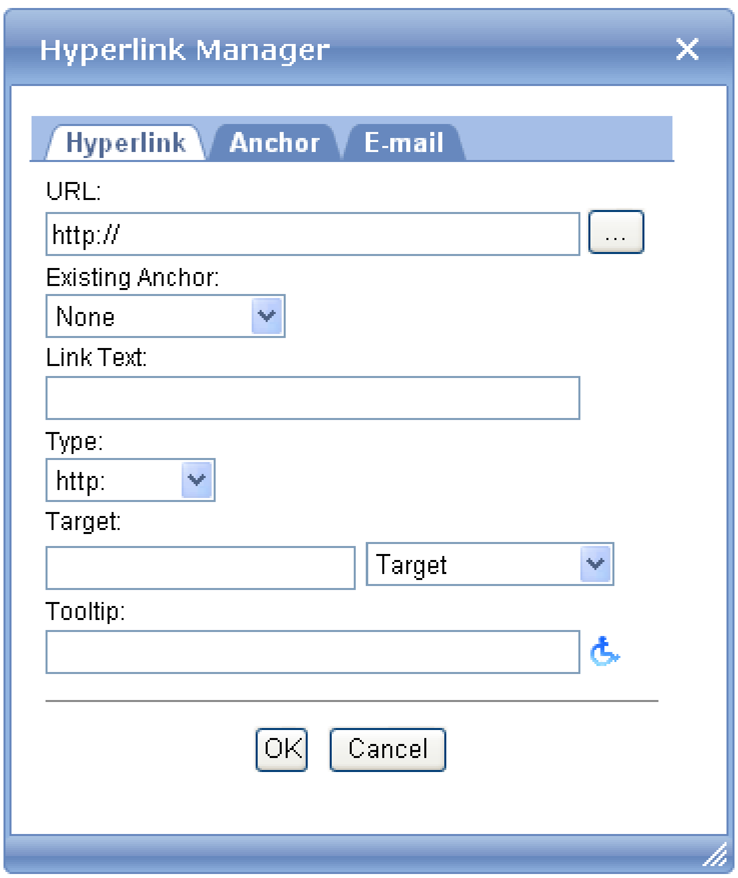
NOTE: If an approval chain, or workflow, is in place for your department, please see Working with an Approval Chain, Section 2.7 (page 13) for additional information.

2.4.1 Using Hyperlinks and Bookmarks

Use hyperlinks to let a user "jump" from any word or phrase to another page within the CMS or anywhere on the Internet. When creating a hyperlink, you must specify a **source** and a **destination**. The source is the text the user clicks to move to the destination. The destination is the section of the Web page that appears when someone clicks the source.

2.4.2 Add Hyperlinks to Non-CMS Web Pages or Sites

1. Select the source text that will become the hyperlink.
2. Click the  (**Hyperlink Manager**) icon in the CMS Editor.
3. Click in the URL field after http://. Then, enter the address of the destination Web page.
4. Use the **Target** drop down menu and select New Window.
5. For the Tooltip, enter text to appear in a small window when someone hovers their cursor over this link.
6. Click OK.



NOTE: To test a hyperlink, save the content. Then, under the View screen's Content tab, click the link to verify that it opens the correct Web page. To go back to your content, click the navigation pane between the folders and the Workarea.

2.4.3 Add Hyperlinks to CMS Pages

1. Select the source text that will become the hyperlink.
2. Click the **Hyperlink Manager** icon ( ) in the CMS Editor.
3. Select the source text that will become the hyperlink.
4. Click the ... (Ellipsis button) to browse the Library and insert the Quicklink to the desired page.
5. Use the Target drop down menu and select New Window.
6. For the Tooltip, enter text to appear in a small window when someone hovers their cursor over this link.
7. Click OK.

2.4.4 Editing a Hyperlink

To change a hyperlink's destination Web page or target frame, follow these steps:

1. Select the hyperlinked text.
2. Right-click your mouse.
3. Click **Set Link Properties**.
4. Edit the fields as needed.
5. Press OK.

2.4.5 Removing a Hyperlink

To remove a hyperlink from text, select the text and press the **Remove Link** icon ( ).

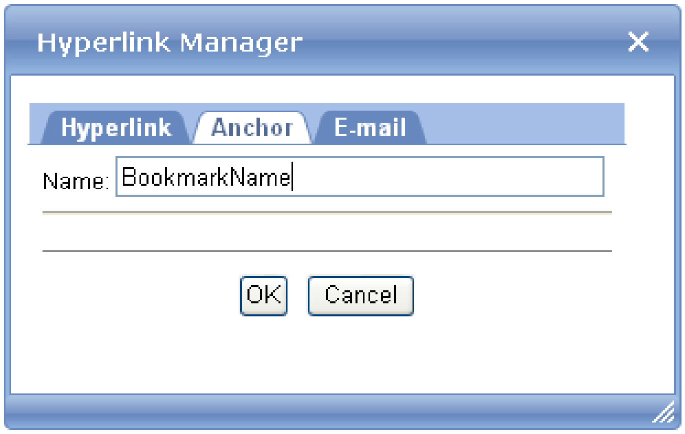
2.4.6 Using Bookmarks

Bookmarks are particularly helpful if your page is very long. Use bookmarks to let a user "jump" from any word or phrase to another place in the same content block. Within your content block, text appears in a different color to indicate the bookmark.

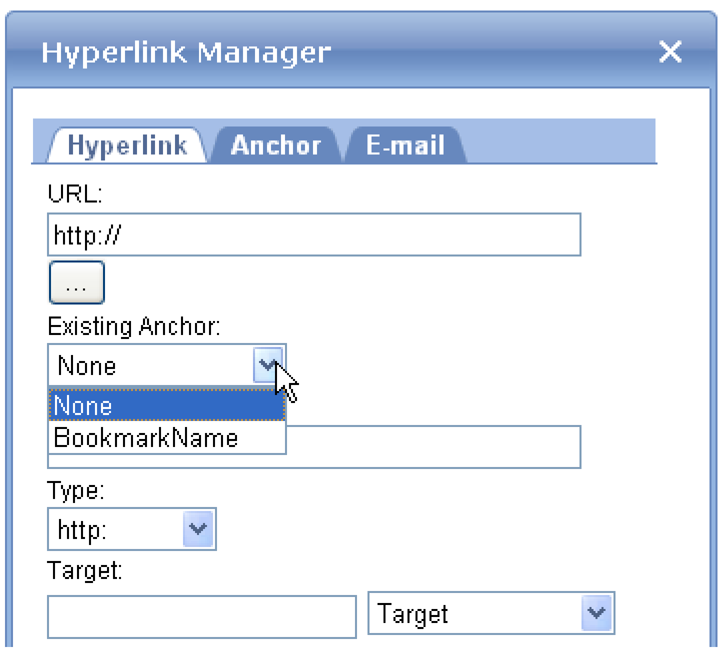
When creating a hyperlink, you must specify a **source** and a **bookmark**. The source is the text the user clicks to move to the bookmark. The bookmark is the destination to which the cursor jumps when a user clicks the source.

To create a bookmark, follow these steps:

1. Select the bookmark text.
2. Click the **Insert Anchor** icon ().
3. The Hyperlink Manager dialog appears with the **Anchor** tab selected.



4. Enter a name for the bookmark. If more than one word will be used for the bookmark, use the title case format with no spaces.
5. Click **OK**.
6. Select the source text.
7. Click the **Hyperlink Manager** icon ().
8. The Hyperlink Manager dialog appears with the **Hyperlink** tab selected.



9. Click the down arrow below the **Existing Anchor** field and click the bookmark you created in Step 4.
10. Click **OK**.

2.4.7 Inserting Email Links

Use the Contact Us Web Application to avoid using staff names for email addresses, if possible. For short term announcements or releases, the E-Government Team can assist in setting up temporary Contact Us email accounts. If it is necessary for an employee to be the sole contact of an announcement or release, follow these steps:

1. Select the text.
2. Click the **Hyperlink Manager** icon ().
3. Click the **E-mail** tab.
4. In the **Address** field, enter the email address to which the message will be sent. If you will be using a link from the Contact Us Web Application, paste the URL into the Address field.
5. In the **Subject** field, enter the default text for the email's Subject line, if desired. The user sending the mail can edit this text.
6. Click **OK**.

2.5 Check In / Check Out Content

It is important to check content in when you are done working on it – if it will not be immediately published to the Web. A checked-in content item is one to which changes were made, after which it was checked in instead of being submitted or published. When content is checked in, it is accessible to all users who have permissions to edit it. They can check it out and change it.

Whenever you check out, or edit, content, it "locks" the content so that no one else is able to make changes while you are working on it. While in this status, other users are prevented from editing it. The content remains checked out until it is checked in by the user who checked it out or a system administrator. Only the user who checked out the content can edit it.

2.6 Working with Content

See Section 3.6 (page 19) for additional information.

2.6.1 Publish Content

For content that is ready to be immediately published to the Web, click the (**Publish**) icon in the upper left corner.

2.6.2 Edit Content

1. Navigate to the content you want to edit.
2. Click the (**Edit**) icon to begin the editing your content.
3. Make any edits that you need to make by editing the text contained within the main body area of the CMS Editor.
4. When you are satisfied with the edited content, press the (**Checkin**) icon to check the content in or click the (**Publish**) icon to immediately publish the edited content.

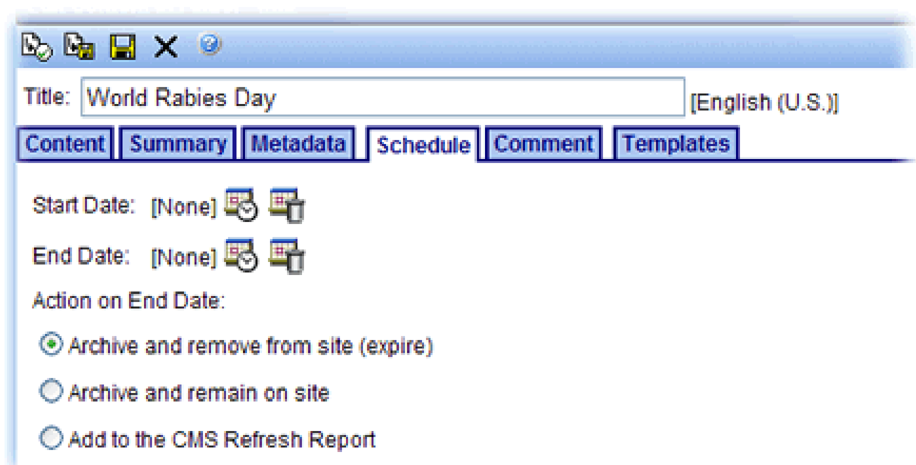
2.6.3 Archive Content

Use the content's archive options to determine what happens upon reaching its end date/time. To be eligible for any option, the content must already be published and should have reached its end date/time. Until those events occur, the content remains visible both within its content folder and on the site. Once content is expired, you may view and/or republish the content by following these steps:

1. From the Content tab, click **View**
2. Click **Archived Content**
3. Select the **Title** of the archived content.

2.6.4 Using the Content Schedule Feature in Lieu of Deleting Content

We discourage everyone from deleting content from the CMS. Once the content is deleted, there is no way to recover it if you find yourself needing that same page again at a later time. Instead of deleting the content, we strongly suggest that you use the scheduling feature of the CMS.



1. Navigate to and click on the content you want to delete.
2. Click the **Edit** icon.

3. Click the **Schedule** tab.
4. Select a Start Date by clicking the calendar icon. Start Date is when the document will be made accessible to the public.
5. Select an End date by clicking the calendar icon. The End Date is when the document will be expired and archived.

2.6.5 Content Borders

If content has a green border, it is live on the Web site. It could also mean that content is checked in. When content is checked in, it is accessible to all users who have permissions to edit it.

If content has a red border, it was checked out by a user. While in the status, other users are prevented from editing it.

If content has a yellow border, it means that a user submitted the content into an approval chain. The border remains yellow until the content is published.

2.6.6 Content Statuses

The table below describes all possible content statuses.

LETTER	BORDER COLOR	MEANING	CONTENT STATE
A	Green	**Approved**	Published on the Web site.
O	Red	**Checked Out**	Currently being edited. Has not been checked in.
I	Green	**Checked In**	Checked in for other users to edit.
S	Yellow	**Submitted for Approval**	Saved and submitted into the approval chain.
P	Grey	**Pending Go Live Date**	Approved, but the Go Live date has not occurred yet.

2.7 Working with an Approval Chain or Workflow

The approval chain, or workflow, begins when a content contributor submits new or edited content. Once the contributor has finished working with the content, and is ready to submit it to their departmental approver, the user must click the **Submit** icon ( ).

NOTE: The contributor must inform the departmental approver of the staged, or unpublished, content. After the approver is notified by the contributor of the edited content, it is up to the approver to publish the content changes, which *may* involve additional editing of the content.

2.8 Working with the Library

2.8.1 Add PDF Files to the Library

NOTES:

1. **PDF files should be no larger than 5MB in size. To determine the size of your PDF file, open the file and right-click on Document properties...**
2. **If your PDF file contains scanned pages, be sure that you have used Acrobat Professional to apply OCR recognition. This allows all users to search for text within the file, and makes the file more usable to individuals with visual impairments.**
3. **Title all your PDF files. Right-click on Document Properties and enter your title under the Description tab.**
4. **For assistance in optimizing, or reducing file size for Web use, please contact the E-Government Team for assistance.**

1. Go to the **Workarea.**
2. Click on the **Library** tab.
3. Navigate to your Department folder and click the **info** subfolder, or appropriate subfolder.
4. In the drop down menu, select **Files**.
5. Click the **Add Library item** icon ().
6. Enter a brief and descriptive **Title** for the file. This title will appear in your departmental RSS feed.
7. **Browse** to the location of the PDF file.
8. Enter a brief description in the **Description** field. This text will appear in your departmental RSS feed.
9. Click the **Save** icon ().

2.8.2 Add Images to the Library

Microsoft Office Picture Manager or Photo Editor (discontinued Microsoft product on older PCs) is installed on all City PCs. You can access one of these image editing programs by locating Microsoft Office, from your Programs menu. You may also use an image editing program in which you are already familiar, however, you must be mindful of the ITS' Information Technology Acquisition Protocol for approved image editing programs.

1. Click on the **Library** tab.
2. Navigate to your Department folder and click the **info** subfolder, or appropriate subfolder.
3. In the drop down menu, select **Images**.
4. Click the **Add Library** icon ().
5. To add your image, first give it a unique name to the image in the **Title** field. This is the text that will display when the image is rolled over.

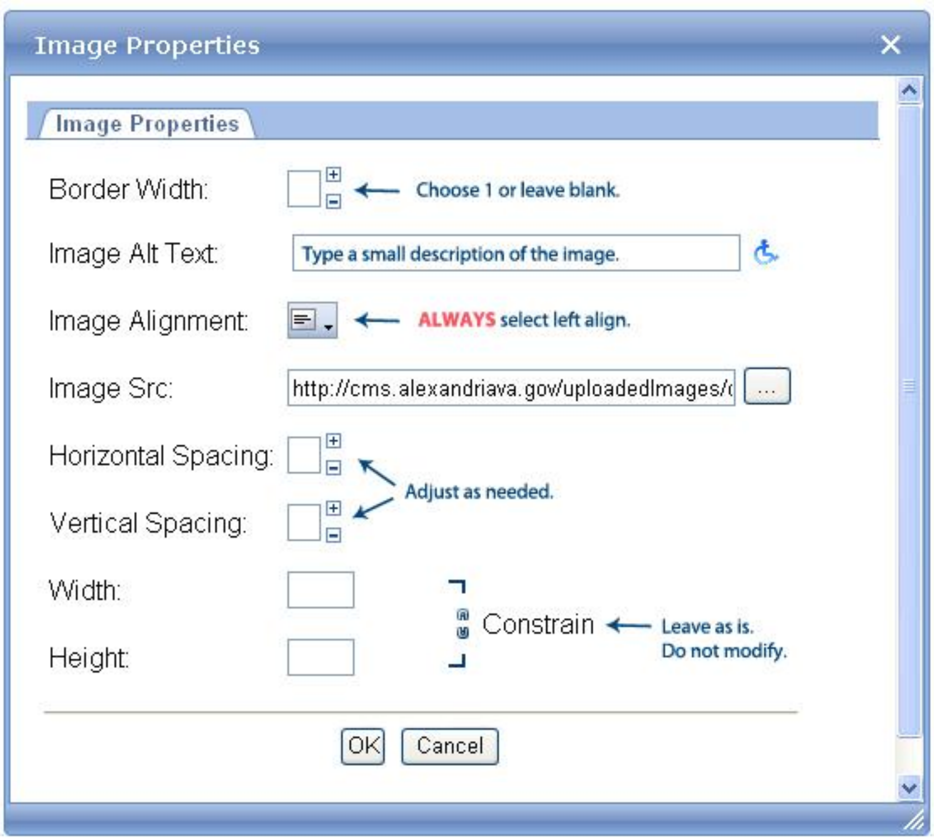
6. Next, click the **Browse** icon and navigate to the location of the image on your computer. After you have selected it, the location will appear in the Filename field.
7. To add the file to the library, click the **Save** icon ( ).

2.8.3 Adding a File to the Library and Inserting it Into Content

Use this procedure to insert an image into content that has not yet been copied to the Library. This procedure inserts the item into the Library, then into the content.

1. Place the cursor where you want the Library item to appear.
2. Click the **Library** icon ( ).
3. Navigate to your Department folder and click the **info** subfolder, or appropriate subfolder.
4. From the file types dropdown list, click the **Add Library** icon ( ).
5. **Browse** to the file you want to insert.
6. Enter a **Description** for the file.
7. Click the **Add Library** icon ( ).
8. The file is inserted into the selected Library folder and the content.

NOTE: To modify the image, select the image and right-click onto Set Image Properties.



2.8.4 Add Hyperlinks to PDF Files

To add a link from your content to a PDF file, follow these steps:

1. Select the text that will link to the file.
2. Click the **Library** icon ( ) to open the Library window.
3. Select **Files** from the drop down menu.
4. Navigate to the location of the file you wish to link to.
5. Select the file and click the **Insert Item to Library** ( ) icon to add the link.
6. Right-click the hyperlink to open the **Set Link Properties** dialog box.
7. Click **OK**.

2.8.5 Add Hyperlink to Images

To add a link from an image, follow these steps:

1. Select the image.
2. Click the **Insert Anchor** icon ( ).
3. The Hyperlink Manager dialog appears. Select the **Hyperlink** tab.
4. Enter a URL.
5. Under the Target drop down menu, select **New Window**.
6. Click **OK**.

2.8.6 Overwriting PDFs and Images

The new image or file must have the same file name as the file being replaced. If a PDF or an image becomes out of date or the wrong version was copied, you may replace it with a new version.

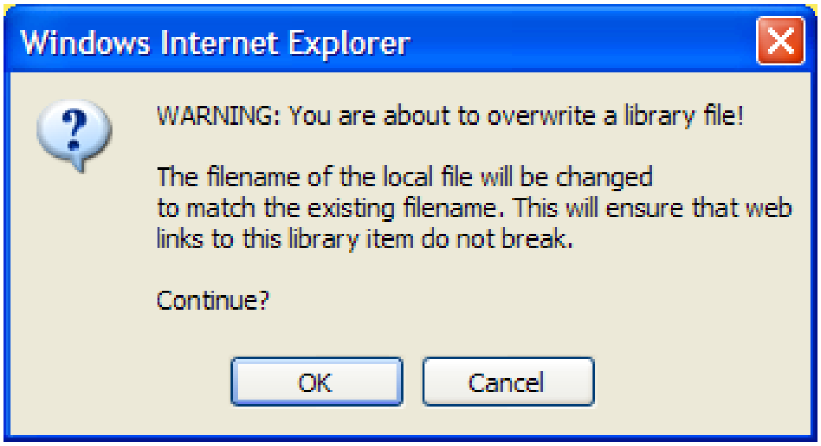
NOTE: When overwriting an image, the new image uses the same size dimensions and file extension as the older image.

NOTE: PDF files should be no larger than 5MB in size. To determine the size of your PDF file, open the file and right-click on Document properties... For assistance in optimizing, or reducing file size for Web use, please contact the E-Government Team for assistance.

To overwrite a PDF or image, follow these steps:

1. Go to the Library tab.
2. Navigate to the file by clicking on the title.
3. Click on the **Overwrite ( )**.
4. Click the Browse… button to select the replacement file.

5. If necessary, enter a Description for the new file.
6. To overwrite the current version of the file with the newer version, click the  (**Update**)
7. The following message appears:



8. To overwrite the file, click **OK**.

3 MISCELLANEOUS

3.1 Change Your Password

1. Go to the Workarea.
2. Select **Settings** > **User Profile**.
3. Then click the **Edit** icon.
4. Replace both the **Password** and **Confirm Pwd** with your new password.
5. Then click the disk icon to save changes.

NOTE: Please remember your password, as the E-Government Team cannot retrieve it, and it will need to be reset.

3.2 Log Out

1. Click the **Logout** button (

) in the Content's floating toolbar OR click the Logout button (

) on the Web page.
2. The **Logout** confirmation box appears.
3. Click the **Logout** button.

3.3 File Names

- No underscores, spaces or hyphens – only English, alphanumeric characters (no special or international characters).
- Use mixed case, such as FilingDeadline.pdf.
- Include dates in file names, **EXCEPT** for documents that are intended to be updated annually or irregularly. For example, FilingDeadline2005.pdf, FilingDeadline2006.pdf. Simply naming the file FilingDeadline.pdf would allow for easier updates and permanent links from other sites.
- Use dates for old files that will be kept active on the CMS.

3.4 Images

- If an image accompanies a hyperlink, the image should also act as a hyperlink.
- Optimize image sizes (standard is 72 dpi for Web graphics)
- Use JPGS or GIFs.
- Always use a title for an image, so that users who cannot see the image will have a description. All Titles (images, content and attachments) are required to have unique names, otherwise, the CMS will add numbers in parenthesis to the end of your title to differentiate media. (e.g., FYI Alexandria (1))
- If importing HTML, all images need to have an ALT tag.

- Use your discretion on the dimensions of your image.
- Animated GIFs should not be used, except to illustrate a process or another similar step-by-step graphic.
- If you are unsure about image properties (animation, sizing, resolution, etc.), please contact the E-Government Team for guidance.

3.5 Media Files

Submit audio and/or video media to the E-Government Team or place in a shared network drive, if applicable. PowerPoint presentations **must** be converted to PDF files, as it is the City's standard for Web use.

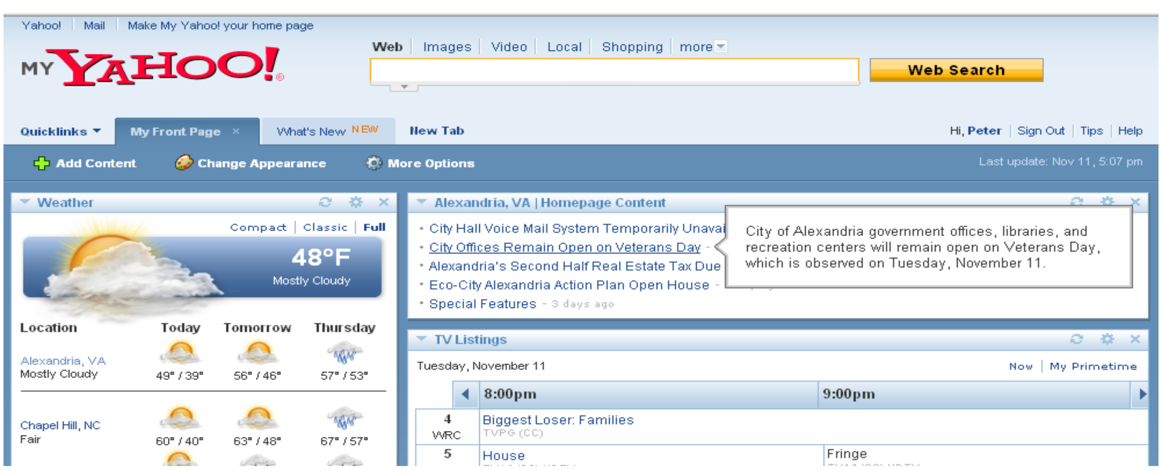
3.6 Departmental RSS Newsfeeds

The City's Web site allows users to subscribe to Really Simple Syndication, or RSS, feeds for every CMS page. RSS provides an easy way for users to read the latest postings. Many Web sites offer RSS feed subscriptions so that whenever new content is published, the user will receive a summary or the full article automatically in their RSS aggregator.

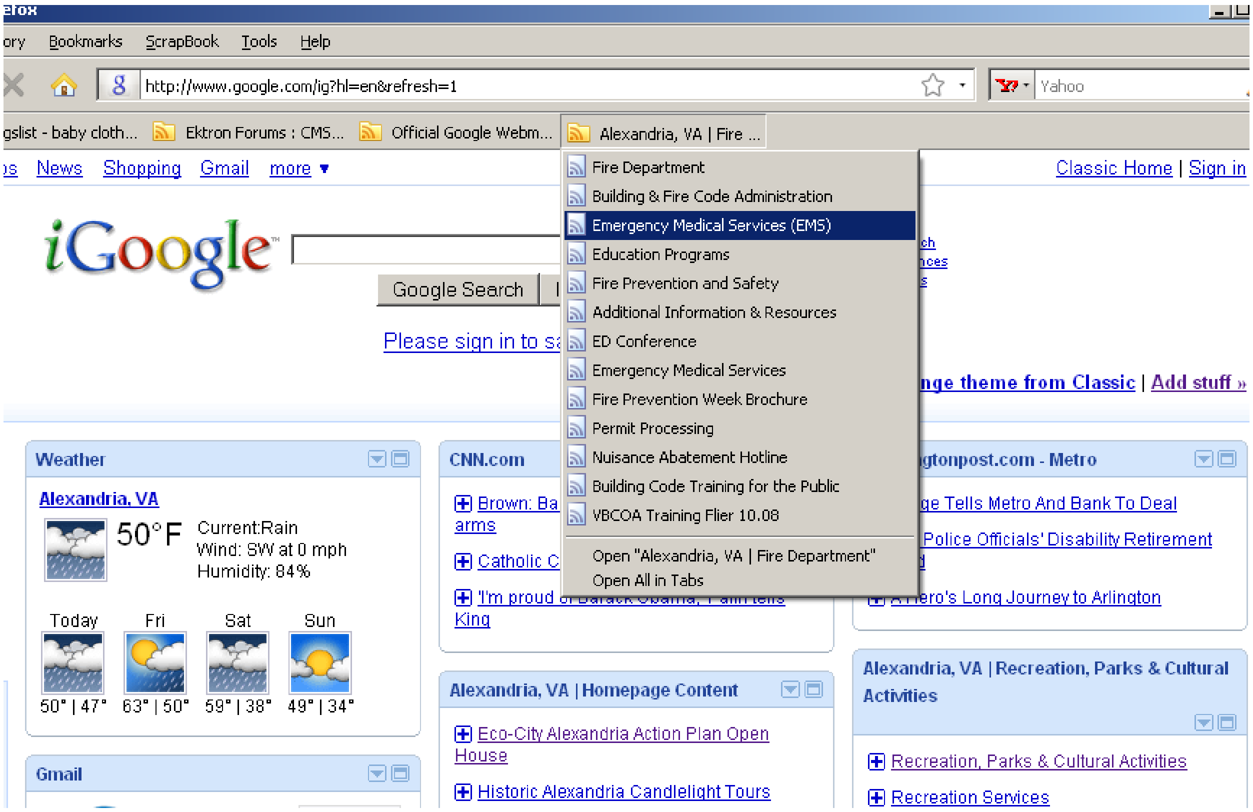
There are a number of ways that users can subscribe to RSS feeds from Web sites that interest them:

- The latest Web browsers have built-in support for RSS feeds.
- Web sites like Yahoo! and Google allow users to place headlines from RSS feeds onto personalized custom Web pages.
- Specialized "RSS aggregator" software.
- Microsoft Outlook has a built-in RSS aggregator (under File, Account Settings, Account Settings, RSS Feeds).

Custom Yahoo! page showing Alexandria RSS including content summary below.



Custom Google page with Recreation content, shown in Firefox with Fire Department "live bookmark"

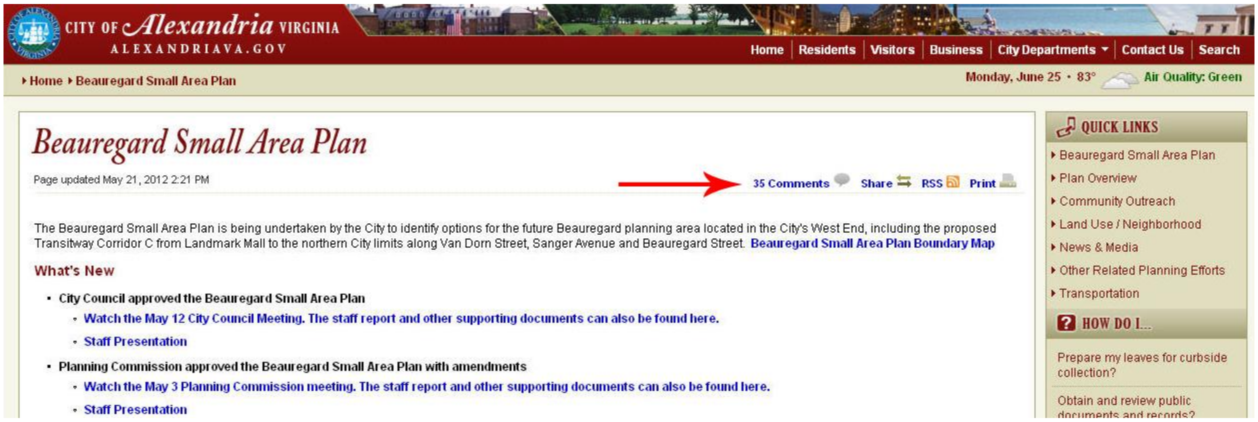


What are the keys to making RSS useful for your visitors?

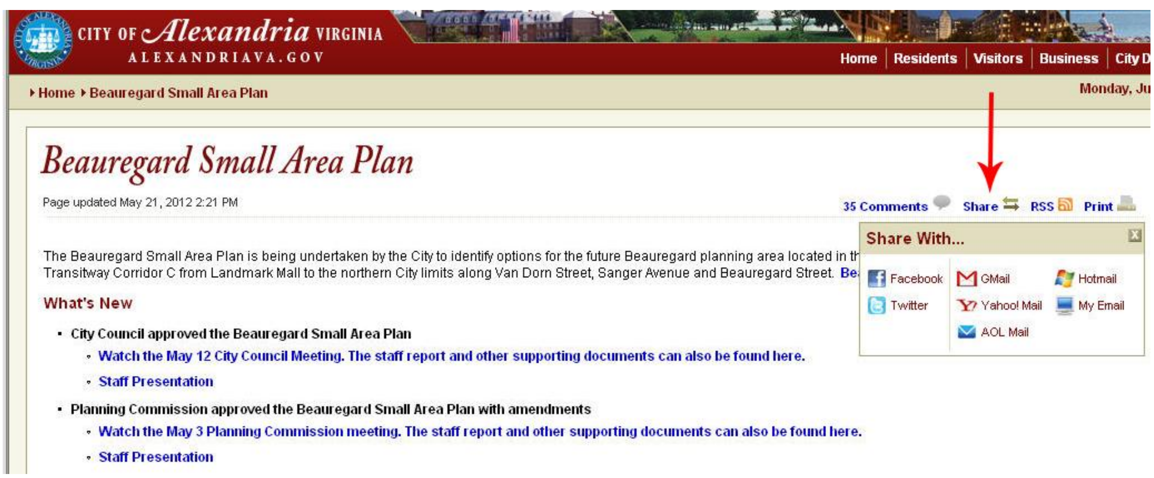
- Use clear titles for both HTML content and PDF files that you upload. The "headlines" of your RSS feeds will be the titles you choose in the CMS. This includes files, so it's not enough to name the .pdf file well (MeetingMinutes2008Oct31.pdf), but you should also choose a good title, e.g. "Meeting Minutes, Oct 31 2008".
- Write a good summary text for your Content and Descriptions for your uploaded PDF files. The text you provide in those fields are displayed in the RSS feeds.
- Remember that the most recently modified content is listed first. If you add an important page and then make minor changes to a number of existing pages, your new page could get lost -- most customized Web sites only show the first 3-5 entries in your RSS feed. If you're updating several pieces of content, make the minor changes first, then major changes, and then add new content.

3.7 Sharing your Content

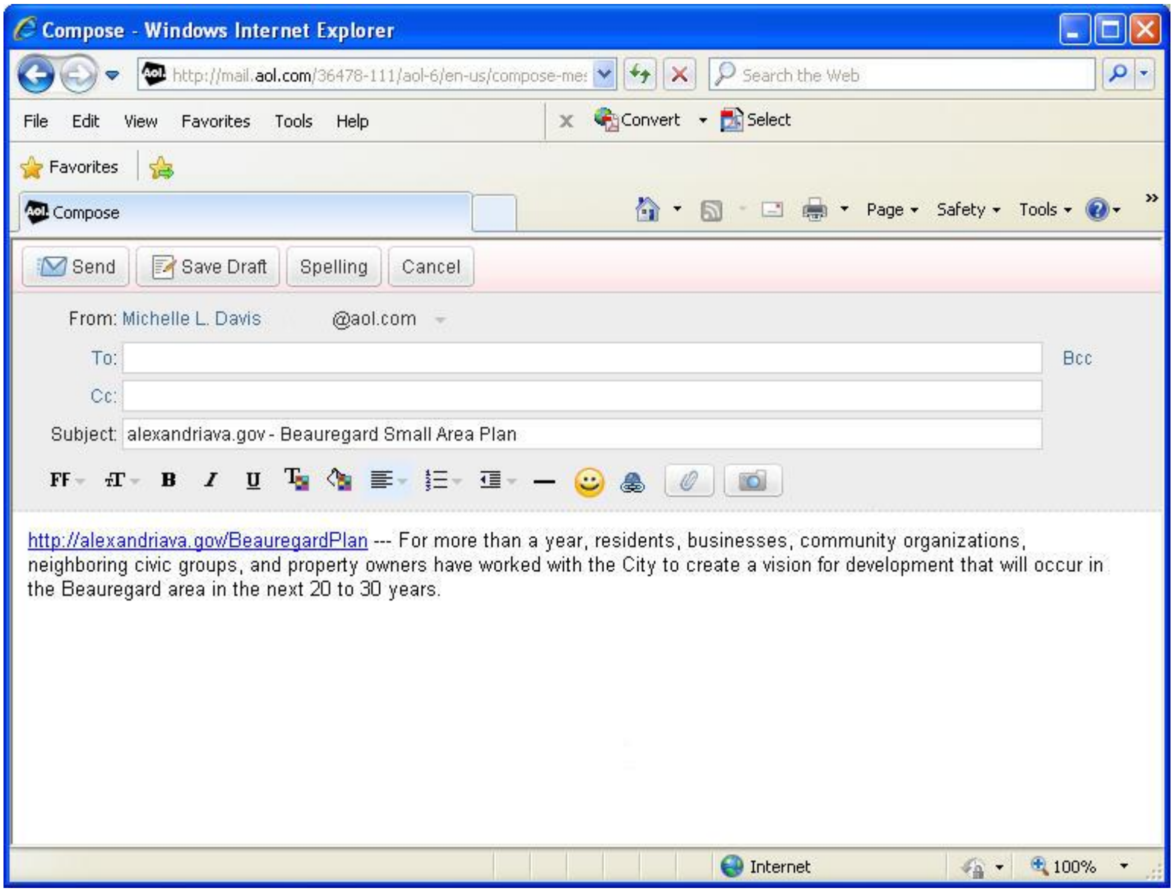
Users are now able to comment on a particular page by clicking the Comment link. You will be required to log in using the MyAlex Web Login. You may create an account for alexandriava.gov if you do not have one or you may log in with a Google, Yahoo!, or secure OpenID account.



To share content through email, and the various social networking sites, click the hyperlink "Share" as shown on the image below.



As an example, selecting AOL Mail as shown in the above illustration will open your AOL mail account. The Content title will be the subject of your email, the content summary, and a link to the page will be displayed in the body of your email. Simply provide the other required information and send your email.



If you share the same content with Twitter, the Content Title and a link to the page will be displayed on your post.

3.8 Content

- Use brief and detailed content titles. The titles are used for the City's RSS feeds, which help visitors learn about the latest updates to the City Web site as soon as they are posted.
- Avoid using staff names for email address, if possible. Use the Contact Us Web application. For short term announcements or releases, the E-Government Team can assist in setting up temporary Contact Us email accounts.
- Heading 1 should always be used for page titles, and Heading 2 should be used for all subheaders.
- All titles and text should be left aligned, **never centered**.
- Press enter for a new paragraph and shift + enter for a line break or "to move to the next line."
- Use Spell Check
- Use the Select Style Modifier, on the Editor tool, to differentiate between headings, sub headings, etc.
- All Titles (images, content and attachments) are required to have unique filenames, otherwise, the CMS will add numbers in parenthesis to the end of your title to differentiate media. (e.g., FYI Alexandria (1))
- Use the Communications Office's Preliminary Style and Protocol Guide, on CityNet, for City Publications as a guide (such as dates, times, telephone numbers, etc.)
- When referring to external links, be sure to select New Window from the Target Frame drop down menu.
- When creating content, keep the overall "look and feel" of the Web site, the customer, and these guidelines in mind at all times.
- Do not embed code, such as javascript, from another site without prior approval from the E-Government Team.

3.9 References and Links

The City's Web sites list information about or links to non-City entities for the convenience of users. The sites accessible through these links are not created, maintained, or controlled by the City, and the City makes no representations concerning their content. In no case shall mention of a non-City entity constitute an endorsement of that entity by the City, nor shall the failure to mention a non-City entity constitute disapproval of that entity by the City. When a City Web site lists entities in a particular category, every attempt is made to list all entities in that category, and to link to those entities' Web sites when available. If a particular entity is not listed, or a link is incorrect or missing, please contact us by e-mail or by phone at 703.746.3960 so that the information may be updated.

To sum it up, the most important rule of thumb is that we do not give preference to one private website over another in the same category. For example, if we want to put a list of pizza restaurants, we need to list all of them. We can use rational criteria (must be licensed business, must be located in Alexandria, etc.), but otherwise we cannot leave anyone out.

3.10 Troubleshooting Solutions

1. While in the Workarea, if the folders are not displaying at all, right-click and select Refresh. If that does not remedy the problem, simply close completely out of the CMS and log back in.
2. If you are unable to install the CMS, you may not be an administrator for your PC. Please contact your IT Coordinator or the City's Help Desk (703.746.3060) for installation assistance.

3.11 Assistance

This Webmaster's Guide is not the only resource to the functionality of the CMS. Contact the E-Government Team with any questions or concerns by email at "Web Team" or by phone at 703.746.3960.